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Message Text

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62
ACTION AGR-10

INFO OCT-01 EUR-12 ISO-00 EB-07 COME-00 INR-07 /037 W
---------- 056930
R 142114Z FEB 75
FM AMEMBASSY OTTAWA
TO SECSTATE WASHDC 5657

UNCLAS OTTAWA 0544

PASS AGRICULTURE

E.O. 11652: N/A
TAGS: EAGR, CA
SUBJ: QUARTERLY MEAT CABLE

REF: (A) CODE NO. 13C

1. GNP QUARTERLY REAL GROWTH AT ANNUAL RATES

QUARTER	1973	1974
1ST	12.4	5.9
2ND	1.5	-0.1
3RD	2.8	2.0 (EST.)
4TH N	10.9	-0.2 (EST.)

2. SUPPLY AND DISPOSITION: PORK, MUTTON AND LAMB, POULTRY, (THOUSAND POUNDS).

		ESTIMATE	POST FORECAST
(A) PORK	1973	1974	1975
STOCKS,JAN 1	18,803	33,051	22,725
PRODUCTION	1,360,418	1,395,000	1,325,000
IMPORTS	54,131	73,500	70,000
TOTAL SUPPLY	1,433,352	1,501,551	1,417,725
EXPORTS	125,614	98,000	80,000

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DOM.

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DISAPPEARANCE 1,274,687 1,380,826 1,322,725
STOCKS,DEC 31 33,051 22,725 15,000
PER CAPITA (LBS) 57.6 61.4 58.0

(B) MUTTON AND LAMB
STOCKS,JAN 1 9,103 7,067 6,655
PRODUCTION 21,893 17,000 16,500
IMPORTS 58,410 43,000 40,000
TOTAL
SUPPLY 89,406 67,067 63,155
EXPORTS 156 125 100
DOM.
DISAPPEARANCE 82,183 60,287 58,555
STOCKS,DEC 31 7,067 6,655 4,500
PER CAPITA(LBS) 3.7 2.7 2.6

(C) POULTRY

STOCKS,JAN 1 56,454 75,899 87,400
PRODUCTION 1,0942.941 1,057,100 1,009.700
IMPORTS 17,572 17,700 16,500
TOTAL
SUPPLY 1,116,967 1,150,699 1,113,600
EXPORTS 4,931 21,011 7,501
DOM.
DISAPPEARANCE 1,036,137 1,042,288 1,040,099
STOCKS,DEC 31 75,899 87,400 66,000
PER CAPITA(LBS) 46.9 46.3 45.6

3. BEEF PRODUCTION

A) ESTIMATE OF CATTLE NUMBERS ON FARMS (THOUSANDS).

1973 1974 1975 1)

JUNE 1 14,134 14,979 15,400
DEC 31 13,370 14,000 2) 14,500

B) SLAUGHTER (THOUSANDS).

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- CATTLE 3,412 3,527 2) 3,750
- CALVES 482 648 2) 800
TOTAL 3,894 4,175 2) 4,550

1) POST FORECAST
2) POST ESTIMATE

C) SUPPLY AND DISPOSITION (THOUSANDS LBS. CARCASS

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WEIGHT EQUIVALENT).

		POST	
	EST.		FORECAST
	1973	1974	1975
STOCKS,JAN 1	50,006	57,113	45,000
PRODUCTION			
TOTAL	1,976,432	2,025,000	2,075,000
BEEF	1,910,575	1,943,000	1,980,000
VEAL	65,857	82,000	95,000
IMPORTS			
TOTAL	224,938	185,000	170,000
BONE-IN	25,842	11,500	10,000
BONELESS			
FRESH	21,876	12,000	8,000
FROZEN	147,432	137,000	135,000
OTHER	29,788	24,500	17,000
TOTAL SUPPLY	2,251,376	2,267,113	2,290,000
EXPORTS TOTAL	88,204	55,000	30,000
BEEF			
BONE-IN	14,036	6,500	3,500
BONELESS	60,888	40,000	22,000
CURED	6,526	3,500	1,500
VEAL	2,294	1,000	1,000
N.E.S.	4,461	4,000	2,000
DOM. DISAPPEARANCE	2,106,059	2,167,113	2,215,000
STOCKS,DEC31	57,113	45,000	45,000
PER CAPITA(LBS)	95.2	96.4	97.2

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4. PRICE FORECAST

(A) WHOLESALE DRESSED MEAT PRICES - SOUTHERN ONTARIO

(A1 STEER CARCASSES/SIDES 500-700 LBS: CDN. CENTS/LB.)

	FINAL	PRELIMINARY	ESTIMATE
	1973	1974	1975
JANUARY	71.43	89.52	86.60
FEBRUARY	72.96	88.10	84.00
MARCH	74.66	81.97	86.00
APRIL	75.95	81.16	86.00
MAY	77.21	84.52	87.00
JUNE	80.30	86.29	90.00

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JULY 81.13 90.67
AUGUST 98.79 91.37
SEPTEMBER 88.07 91.42
OCTOBER 84.54 88.09
NOVEMBER 83.59 92.59
DECEMBER 82.84 90.60
ANNUAL
AVERAGE 80.96 88.03

(B) IMPORTED BONELESS BEEF PRICES AVAILABLE FROM L&MP/FAS/W

5. QUARTERLY ESTIMATE OF BEEF AND VEAL EXPORTS TO THE U.S. (1,000 LBS. PRODUCT WEIGHT).

BEEF AND VEAL EXPORTS TO U.SM

QUARTERS	1973	1974	1975
1ST	10,533	11,877	2,000
2ND	12,862	6,972	1,000
2RD	25,253	8,905	))
		14,000)) COMBINED	
4TH	7,804	8,125	))
TOTAL	56,452	35,879	17,000

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6. COMMENT:

A. FEDERALLY INSPECTED HOG SLAUGHTER FIRST HALF 1975 PROJECTED TO AVERAGE 6 TO 7 PERCENT BELOW SAME PERIOD LAST YEAR. SOME CANADIAN OFFICIALS FORECAST LAST HALF 1975 SLAUGHTERINGS TO BE 10 PERCENT BELOW 1974 LAST HALF LEVELS.

B. WE BELIEVE THAT CANADIAN LIVE HOG EXPORTS TO THE U.S. WILL BE OFF SHARPLY FROM THE 1974 FIGURE OF 128,746 HEAD AND CONTRIBUTE TO A HIGHER RATE OF HOG SLAUGHTER IN 1975 THAN IS CURRENTLY FORECAST.

C. ALSO RATE OF DECLINE IN HOG MARKETINGS CAN BE BETTER EVALUATED AFTER RELEASE OF STATISTICS CANADA'S QUARTERLY HOG SURVEY WHICH INCLUDES NATIONAL DATA ON FARROWING INTENTIONS AND THE NUMBERS OF SOWS AND GILTS KEPT FOR BREEDING PURPOSES. THIS ANALYSIS WILL BE INCLUDED IN ANNUAL LIVESTOCK REPORT.

D. OUR CURRENT PORK PRODUCTION FORECAST REFLECTS

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ONLY A 5 PERCENT DECLINE FROM 1974 LEVEL UNTIL THE
EVALUATION OF MORE FIRM STATISTICAL DATA SUGGESTS A
REVISION.

E. CANADIAN CATTLE SLAUGHTER ESTIMATED TO INCREASE
IN 1975 APPROXIMATELY 6-8 PERCENT BUT CONTINUATION OF
LOWER CARCASS WEIGHTS WILL REFLECT IN SMALLER INCREASE
IN ACTUAL BEEF OUTPUT.

F. TOTAL CATTLE INVENTORIES IN CANADA ESTIMATED TO
SHOW SMALLER INCREASE THAN 6 PERCENT RECORDED IN 1974.
A GRADUAL SLOWING IN BEEF COW HERD EXPANSION IS EXPECTED.
GREATER LEVEL COW AND CALF SLAUGHTER WILL TEMPER TOTAL
INVENTORY INCREASES.

G. ESTIMATE OF BEEF AND VEAL EXPORTS TO U.S. ASSUMES CON-
TINUATION OF U.S. QUOTA ON IMPORTS OF CDN. BEEF & VEAL.
HOWEVER, SHOULD QUOTAS BE REMOVED, THIS ESTIMATE WOULD NEED
TO BE REVISED UPWARD. PORTER
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